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pt. 3

DOMESTIC TRACKING SURVEY

SUMMARY REPORT

FEBRUARY 1982 - JUNE 1983

REPORT PREPARED BY
TOURISM MARKETING INFORMATION SERVICES

SEPTEMBER, 1983

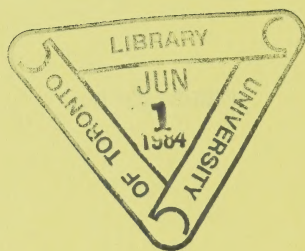
CANON

TO 75

- 83 D57

(PT. 3)

HIGHLIGHTS



HIGHLIGHTS

- Awareness of Ontario follows a seasonal pattern with awareness increasing in the summer and decreasing in the winter. The decrease in the winter is likely due to a combination of factors: reduced media weights, increase in competition from sun destinations, consumers' interest in going south."
- When spontaneous and aided awareness are totalled, awareness of Ontario's advertising reaches 75% in the summer and 50% in the winter.
- Awareness of the "Yours to Discover" slogan reached 94% in the summer of 1983.
- Awareness of the insert has increased over the life of the campaign to the point that a majority of people (55%) reported seeing the insert in the summer of 1983.
- Several attitude statements were included in the research to measure any change in attitude during the campaign. Attitude of Ontarians towards Ontario was consistently high throughout the campaign.
- There has been a measurable positive shift in attitude regarding the amount of information available on the province over the campaign's life. Informing residents about Ontario was one of the campaign's primary objectives.
- Rough estimates indicate the insert generates up to \$34 million in additional expenditures within the province. This generates \$5 million in provincial taxes.



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INTRODUCTION

The Ministry of Health and Social Services has been an active participant in the development of the health care system in the United Kingdom since 1948. The Ministry has been responsible for the development of the health care system in the United Kingdom since 1948. The Ministry has been responsible for the development of the health care system in the United Kingdom since 1948. The Ministry has been responsible for the development of the health care system in the United Kingdom since 1948.

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BACKGROUND, OBJECTIVES AND METHODOLOGY

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BACKGROUND

The Ministry of Tourism and Recreation launched an advertising campaign in the spring of 1980. The theme of the campaign was "Ontario, Yours to Discover". In June 1980 and February 1981, two consumer surveys were conducted to evaluate the campaign in terms of consumer awareness and acceptability. Subsequently, a two year contract was awarded to a consumer research house to track awareness of the campaign twice yearly, in June and in February.

This report summarizes the highlights of the four advertising tracking studies. When relevant, information from the earlier two surveys will be brought in. The Ministry intends to continue on with its program of advertising tracking research in order to monitor the campaign's performance over time.

The summer advertising phases used a variety of media including newspaper, magazine, radio, television and a newspaper insert. The winter media excludes television.

OBJECTIVES

Specifically, the objectives of these tracking studies are to provide measures of . . .

- i) awareness of advertising for vacation travel in Ontario
- ii) recall of media used in advertising for vacation travel in Ontario
- iii) awareness of the "Yours to Discover" slogan.
- iv) recall of the "Yours to Discover" newspaper insert
- vi) intention to travel in Ontario in the next three months

METHODOLOGY

Each of the four waves of the tracking survey consisted of just over 400 adults in Ontario, 18 years of age and over. Interviews were conducted by telephone from Gallup's central telephone facility in Toronto. Interviewing took place in the evenings and on week-ends. Two call-backs were made to households where there was no answer or a busy signal.

The sample was designed to produce random samples of respondents in Ontario 18 years of age and over. Telephone numbers were obtained by adding a constant digit to numbers of respondents interviewed in a recent Gallup Ontario Omnibus study. * This ensures a sample stratified by community size and region. Pre-determined quotas for age and sex resulted in a sample of Ontario residents balanced to Statistics Canada data for Ontario by age, sex, region and community size.

The Canadian Gallup Poll is confident that the samples are representative of Ontario residents 18 years of age and over.

The questionnaire was structured within the framework of the study objectives. It was also designed to maximize comparability with previous similar studies. The same questions were used in all four waves.

The questionnaire for this study was pretested by telephone with 10 respondents in Toronto. A copy of the questionnaire is appended to this report.

* A detailed outline of the Ontario Omnibus Sample design is appended to this report.

RESEARCH RESULTS

SOURCE OF VACATION IDEAS

Respondents were asked where they usually get their ideas on where to go for a vacation. The most often mentioned source is consistently friends or relatives with about one-third giving this response. Newspaper is the second most common mentioned source. (About one-quarter of respondents mentioned newspaper).

MAJOR SOURCES OF VACATION IDEAS

	<u>Winter 82</u>	<u>Summer 82</u>	<u>Winter 83</u>	<u>Summer 83</u>
Base (all respondents)	410	410	409	404
	%	%	%	%
Friends/relatives	34	42	30	35
Newspapers	27	21	20	22
Television	12	7	6	6
I don't travel	3	1	10	5
Don't Know	15	16	14	18

AWARENESS OF ONTARIO
ADVERTISING

Spontaneous Awareness

Top of mind awareness of Ontario (or the first mention given) demonstrates a seasonal pattern with substantially more mentions in the summer period. In the winter test phases, 3% and 1% respectively mentioned Ontario first, while in the summer testing, this rose to 11% and 10% respectively.

When all spontaneous mentions are taken into account, the seasonal pattern persists as shown in the table below. The decrease in the winter phases reflects the reduced media weighting of Ontario's campaign during the winter months. The increased advertising for the sun destinations in this period also compete with Ontario advertising, resulting in a reduced mention of Ontario. The number one mention in the winter is Florida.

TOTAL SPONTANEOUS RECALL
OF VACATION ADVERTISING
(SELECTED MENTIONS)

	Winter <u>82</u>	Summer <u>82</u>	Winter <u>83</u>	Summer <u>83</u>
Base (all respondents)	410	410	409	404
	%	%	%	%
Florida	50	27	48	25
Hawaii	17	6	13	10
New York	6	7	2	7
Ontario	5	19	2	16
Atlantic Provinces	1	10	1	6
Other Canadian Provinces	9	18	10	24
California	4	4	9	7

AWARENESS OF ONTARIO
ADVERTISING

Total Awareness

Those who did not spontaneously mention Ontario advertising were asked specifically about it. When both spontaneous and aided mentions are totalled, we find that 50% of people are aware of Ontario's advertising in the winter and 75% in the summer. Awareness tends to increase with an increase in education and household income.

TOTAL AWARENESS
(UNAIDED PLUS AIDED)

	Winter <u>82</u>	Summer <u>82</u>	Winter <u>83</u>	Summer <u>83</u>
Base (all respondents)	410	410	409	404
	%	%	%	%
Aware	50	75	50	75

AWARENESS OF ONTARIO
ADVERTISING

Source of Ontario Advertising

People who reported being aware of Ontario's advertising were asked where they had seen or heard the advertising. Regardless of whether or not television was actually used as an advertising medium, it received the greatest number of mentions. This is a phenomenon which has been seen over and over again in advertising research where people tend to overattribute advertising to television. In the winter, when television was not used by the Ministry, four out of ten respondents attributed the advertising to T.V. This increased in the summer test periods to six out of ten in the summer of 82 and seven out of ten in 83.

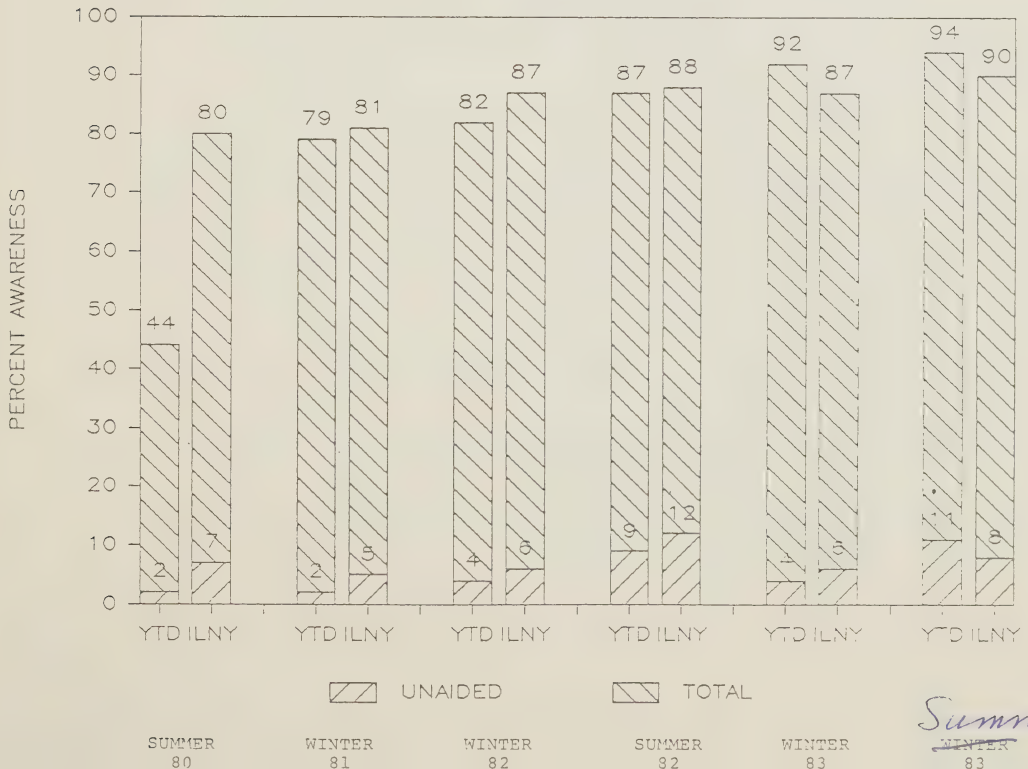
AWARENESS OF ONTARIO
ADVERTISING

Slogan Awareness

While unaided awareness of the "Yours to Discover" slogan remains small, this is true for all slogans tested. Apparently, people have difficulty recalling such slogans off the tops of their heads. Total awareness, however, of the "Yours to Discover" slogan continues to increase as the campaign continues up to a high of 94% in the summer of 1983. This is in contrast to the benchmark "I Love New York" slogan which has remained at a constant level of awareness over the past four waves.

With slogan awareness so high, there is very little differentiation amongst the different demographic segments. Awareness is high across all demographic groups.

AWARENESS OF SLOGAN



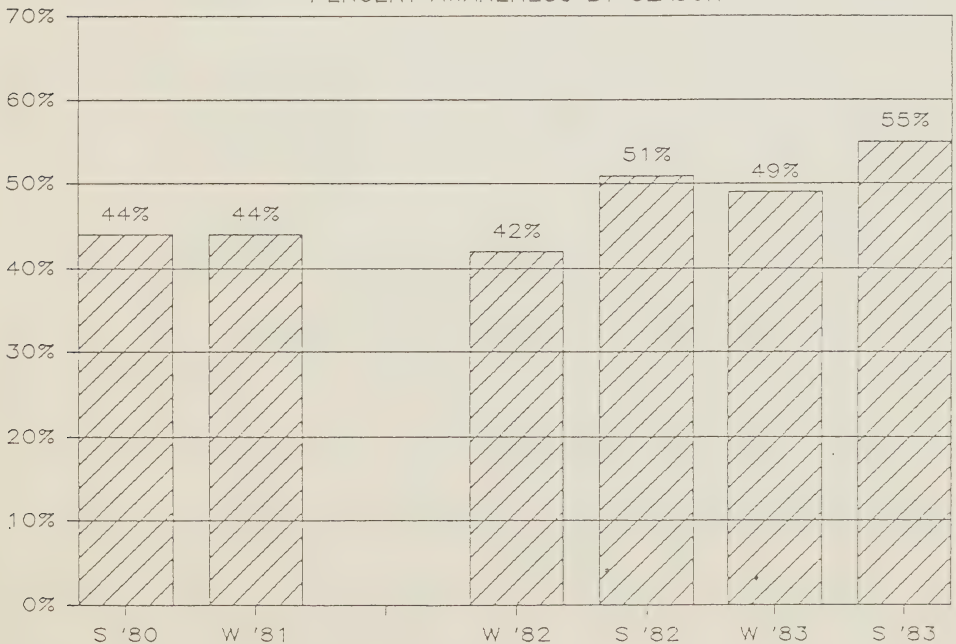
AWARENESS OF ONTARIO
ADVERTISING

Insert

Awareness of the insert has increased over the life of the campaign to the point that a majority of people (55%) reported seeing the insert in the summer of 1983.

The reader profile of the summer and winter inserts tends to be slightly different. The winter insert reader tends to be between 30-49 years of age, with a high school education or higher and from a household with an income of \$25,000 or more. The summer insert, on the other hand, tends to be recognized by a wider range of readers in terms of age and income.

INSERT AWARENESS
PERCENT AWARENESS BY SEASON



ATTITUDE RATINGS

Pre-campaign qualitative research identified some negative attitudes about vacationing in Ontario that were held by some residents. Accordingly, the campaign was designed in part to dispel this negative image. Some of the key concerns were tested by measuring agreement with the following selected attitude statements.

- a) Ontario is a fun and exciting place to spend your holidays
- b) Generally speaking, information on travel in Ontario is not very easy to obtain
- c) There's something for everyone to do in Ontario on a vacation
- d) Ontario is not a very interesting place to spend a holiday
- e) An Ontario vacation represents good value for your money

Agreement (or disagreement in the case of the negative statements) was extremely high. Furthermore, in most cases, agreement was consistent across all demographic groupings.

Awareness of the Ontario advertising does not differentiate attitude to any large extent, probably since agreement is so high initially. Since no pre-campaign testing of the identical attitudes was conducted, it is difficult to determine to what extent the campaign has contributed to this highly positive attitude toward Ontario as a vacation destination. Some qualitative research conducted during the creative development phase of the campaign, however, brought to light a feeling of some people that Ontario was a dull, unexciting place to visit. This may or may not have been a prevailing attitude at the time. If it was a widespread opinion, then it would appear that the campaign has managed to substantially improve Ontarians' attitudes toward an Ontario vacation since attitude ratings are so consistently positive.

An examination of attitude trends over time does indicate some variation. "There's something for everyone to do in Ontario on a vacation" is the highest rated of all the statements tested. Ontarians, almost unanimously agree with this statement. In spite of this extremely high level of agreement, however, there is a statistically significant seasonal variation in this response. That is, agreement with this statement tends to be higher in the summer than in the winter. The lower level in the winter is most likely a reflection of the fact that winter (and snow) is not everyone's "cup of tea". In light of this, the fact that agreement is so high in winter is rather amazing and may reflect the inclusion in the winter advertising of fairs, cultural events etc., which are more universally enjoyed.

There has also been a shift over time in Ontarians' perceptions of the availability of Ontario travel information. This is encouraging because the pre-campaign research identified a concern amongst residents that not enough information was available on the province.

The statement which rated consistently lower than the others is the value for money statement. About three-quarters of people agreed with this statement. This is consistent with other research conducted by the Ministry in which the value of an American and Ontario vacation was compared. The findings indicated that 75% of those who answered the question felt that Ontario was as good or better in terms of value for their vacation dollar.

AGREEMENT WITH ATTITUDE STATEMENTS

	Wave 1	Wave 2	Wave 3	Wave 4
	%	%	%	%
a) Ontario is a fun and exciting place to spend your holidays	84	86	87	88
b) Generally speaking, information on travel in Ontario is <u>not</u> very easy to obtain	30	27	25	22
c) There's something for everyone to do in Ontario on a vacation	89	94	91	95
d) Ontario is <u>not</u> a very interesting place to spend a holiday	10	7	10	6
e) An Ontario vacation represents good value for your money	76	81	77	76

INTENTION TO TRAVEL IN ONTARIO

To measure the impact of this phase of the campaign, respondents were asked whether they planned to take any trips in Ontario in the next three months.

The seasonal nature of travel is again evident in the findings that 25% and 29% respectively in the winter '82 and '83 test phases said they planned to travel in the next three months (March - May). This figure was significantly higher in the summers of '82 and '83 (43% in each case).

The most important question in terms of the success of the campaign is whether or not awareness can be linked to intention to travel. The data seems to indicate a definite yes. More people who are aware of the advertising reported an intention to travel than those who were not aware. This was significant in three out of the four waves. In the fourth case (summer 1982) the difference was in the same direction but did not reach statistical significance. This appears to indicate some type of causal relationship between awareness and intention. The direction of this relationship, however, can go either of two ways; 1) The advertising influences intention to travel or 2), intention influences the tendency to be aware of advertising.

In terms of the first argument, the data would be interpreted to mean that awareness of advertising makes people almost twice as likely as those who are not aware, to be planning a trip in Ontario.

On the other hand, in keeping with the second possibility, one might argue that those people who are already interested in travel in Ontario will be seeking out information and for this reason will be more likely to be aware of the advertising. In that case, the advertising would be reaching those who are already interested in Ontario.

Even if the second scenario is the case, other information would indicate that the advertising can influence trip takers to take more trips or to spend additional money. (See impact of insert following). Whichever situation may turn out to be the case (and likely it is a combination of both), tourism will experience the positive affects of advertising in terms of additional travel within the province and increased expenditure as a direct result of the insert advertising.

The success of the winter insert in encouraging travel appears to be increasing. In 1982, 27% of insert readers intended to travel in the three months following its release. By winter 1983, this had increased to 36%. The summer insert remained at a constant level of 45%.

PERCENT INTENDING TO TRAVEL IN ONTARIO
IN THREE MONTHS FOLLOWING SURVEY

	<u>Aware of Advertising</u>		<u>Aware of Insert</u>		<u>Aware of Slogan</u>	
	<u>Yes</u> %	<u>No</u> %	<u>Yes</u> %	<u>No</u> %	<u>Yes</u> %	<u>No</u> %
Base (total respondents)						
Winter 82	29	20	27	24	27	20
Summer 82	45	39	46	39	45	31
Winter 83	34	18	36	22	30	25
Summer 83	45	34	46	50	44	28

|_____| difference significant at 90% level

IMPACT OF THE INSERT

A direct attempt was made to determine the impact of one element of the campaign, the insert. This was selected since it is believed to be readily distinguished by consumers from other advertising sources such as T.V. and newspaper advertisements.

Respondents were asked whether they took, or planned to take any pleasure trips in Ontario that they hadn't originally planned to take as a result of reading the insert. No future time limitation was specified. Twenty-seven percent of those who had seen the summer 1983 insert said yes they would take a previously unplanned trip. This represents fifteen percent of the total sample. Because of the difficulty of predicting behaviour in any great detail, no attempt was made to gather information about the intended trip or trips. Accordingly, the estimate may be a conservative one, but if all fifteen percent of the population actually take only one additional trip, this would result in a total of 866,000 extra person trips in Ontario. Using the average trip expenditure derived from previous research (\$39.00 per person trip), an additional \$34 million would be generated as a result of the insert. The \$34 million in expenditure generates about \$5 million in provincial taxes, far more than the \$729,000 it cost the province to distribute the insert.

APPENDIX A

APPENDIX A

THE DESIGN OF THE SAMPLE

The Gallup Ontario Omnibus maintains a modified probability sample in all centres over 1,000 in population. A quota sample is used in rural farm and rural non-farm centres. An independent sample of individuals is selected for each survey.

The sampling procedure is designed to produce an approximation of the adult civilian population, 18 years and older, living in Ontario except for those persons in institutions such as prisons or hospitals, or those residing in far Northern regions. Survey data can be applied to this population for the purpose of projecting percentages into numbers of people.

The sample design incorporates stratification by six community size groups, based on the 1976 Census data: cities of 500,000 population and over, those between 100,000 and 500,000, 30,000 to 100,000, 10,000 to 30,000, 1,000 to 10,000 and rural farm and rural non-farm areas.

The population is arrayed in geographic order by community size and within those classifications, by census enumeration areas. Enumeration areas, on the average, contain about 500 to 600 people.

A total of 105 enumeration areas are selected randomly from this array. Within urban centres, a random block sampling procedure is used to select starting points for interviewers. The interviewer is provided with a map of the enumeration area, showing the location of the starting point and is required to follow a specified route in the selection of households. Within the household, the youngest male, 18 years and over, at home at the time of the interview is questioned. If there is no male available, or when the male quota is completed, the youngest available female, 18 years and over is interviewed.

The selection of rural farm and rural non-farm interviewing locations follows the sample design established for urban centres in terms of geographic dispersion and random selection of enumeration areas. Because of the low population density and wide dispersion of households, the random block sampling procedure is replaced by quota sampling based on sex and age.

The design of the Gallup Poll sample has been based on population statistics of the Census of Canada, 1976.

APPENDIX B

The Canadian Gallup Poll Limited

VACATION STUDY - ONTARIO - WAVE IV

Good...I'm.....from the Gallup organization. We are conducting a study and we'd like to include your opinions in our survey.

i) INTERVIEWER: ASK TO SPEAK WITH:

- youngest male 18 years of age and over, living at home -
IF NOT AT HOME ASK:
- youngest female 18 years of age or over, living at home -
IF NOT AT HOME ASK:
- second youngest male, 18 and over, living at home -
IF NOT AT HOME ASK:
- etc. 3rd, 4th youngest in this manner.

INTERVIEWER: REINTRODUCE YOURSELF IF NECESSARY

1. Generally speaking, where do you, yourself usually get ideas on where to go for a vacation or a weekend trip? DO NOT READ LIST.

MAGAZINES-----1	-14	1
NEWSPAPERS-----2		
BOOKLET/SUPPLEMENT IN NEWSPAPER-----3		
TRAVEL BROCHURES-----4	-17	
T.V.-----5		
RADIO-----6		
TRAVEL AGENT-----7	-20	
FROM FRIENDS/RELATIVES-----8		
OTHER (SPECIFY)-----9		
I ALWAYS GO TO VISIT FRIENDS/RELATIVES-----0	-23	
I DON'T TRAVEL-----X		
DON'T KNOW-----V	-25	

2. For which destinations or places, if any, have you seen or heard advertising related to travel or vacations in the past three months? RECORD 1ST MENTION IN "1ST" COLUMN AND ALL OTHER MENTIONS IN "OTHER" COLUMN. PROBE: What others?

		1ST MENTION	OTHER MENTIONS
<u>CANADA</u>	ATLANTIC PROVINCES-----	1 -26	1 -25
	QUEBEC-----	2	2
	ONTARIO-----	3	3
	MANITOBA-----	4	4 -31
	SASKATCHEWAN-----	5	5
	ALBERTA-----	6	6
	B.C.-----	7	7 -34
	OTHER CANADA (SPECIFY)-----	8	8
* CANADA-----	9	9	
<u>U.S.A.</u>	CALIFORNIA-----	1 -27	1 -27
	FLORIDA-----	2	2
	HAWAII-----	3	3
	MICHIGAN-----	4	4 -40
	LAS VEGAS-----	5	5
	NEW YORK-----	6	6
	OTHER U.S.A. (SPECIFY)-----	7 -	7 -43
<u>OTHER</u>	BAHAMAS/CARRIBEAN/BERMUDA---	8	8
	EUROPE-----	9	9
	MEXICO-----	0	0 -44
	OTHER (SPECIFY)-----	X	X
	NONE/NO OTHERS-----	V	V -48

* IF "CANADA" ASK:

Was this advertising for Canada itself, or for a specific place within Canada?

CANADA-----1

PLACE WITHIN CANADA-----2

IF "PLACE WITHIN CANADA", ASK:

Which place would that be? (RECODE ANSWER IN Q.2)

IF "ONTARIO" MENTIONED, SKIP TO Q.4

IF "ONTARIO" NOT MENTIONED, ASK:

3. In the past three months, have you yourself seen or heard any advertising for vacation travel in Ontario, Canada?

YES-----1 - GO TO Q.4 -50

NO-----2

DON'T KNOW-----3] - SKIP TO Q.5

IF SAW/HEARD ADS FOR ONTARIO, ASK:

4. Where did you see or hear the advertising for Ontario vacations? PROBE: Anywhere else? DO NOT READ LIST.

* BROCHURES-----1 -51

** MAGAZINES-----2

*** NEWSPAPERS-----3

BOOKLET/SUPPLEMENT IN NEWSPAPER---4 -54

RADIO-----5

T.V.-----6

BILLBOARDS-----7 -57

TRAVEL AGENCIES-----8

ONTARIO TRAVEL CENTRE-----9

OTHER (SPECIFY)-----0 -60

DON'T KNOW-----X -61

* IF "BROCHURES" ASK:

You mentioned brochures. Where did you see the brochures?

IN NEWSPAPER-----1 -62

OTHER-----2

** IF "MAGAZINES" ASK:

You mentioned magazines. Was this an ad in a magazine or was it a supplement in the newspaper?

AD (OR ARTICLE) IN MAGAZINE-----1 -63

SUPPLEMENT IN NEWSPAPER-----2

*** IF "NEWSPAPERS" ASK:

You mentioned newspapers. Was this an ad in the newspaper itself or was it a supplement in the newspaper?

AD (OR ARTICLE)-----1 -64

SUPPLEMENT-----2

ASK EVERYONE:

- 3 -

- 5a. In advertising, slogans or catchy phrases are often used. For example, "It's better in the Bahamas" is a slogan used in the travel industry. What other slogans or phrases related to travel and vacations have you seen or heard?
PROBE: Are there any other travel slogans you can recall? DO NOT READ LIST.

	Q.5a	Q.5b	
		YES	NO
() * Ontario - Yours to Discover-----	1	2	3 -65
() * I Love New York-----	1	2	3 -66
() * So much to go for-----	1	2	3 -67
FRIENDLY MANITOBA-----	1 -68		
STAMP AROUND ALBERTA-----	1 -69		
SUPER NATURAL-----	1 -70		
OTHER (SPECIFY)-----	1 -71		

NONE-----	1 -72		

FOR EACH * SLOGAN NOT MENTIONED, ASK:

- b. Have you seen or heard the slogan _____? READ LIST. ROTATE ORDER STARTING WITH "✓".

ASK EVERYONE:

- 6a. As you may or may not be aware, this May weekend newspapers carried and insert booklet titled "Ontario - Yours to Discover". This _____ page booklet outlined places to visit and things to do in Ontario this summer. Do you recall seeing this booklet or not?

-73

YES-----1] - SKIP TO Q.7
NO-----2	
DON'T KNOW-----3	

IF "YES", ASK:

- b. As a result of reading the booklet did you take, or do you plan to take, any pleasure trips in Ontario that you hadn't originally planned to take?

-74

YES-----1
NO-----2
DON'T KNOW-----3

ASK EVERYONE:

7. Now I'd like to know whether you agree or disagree with the following statements. First of all, - (READ STATEMENT) ROTATE STARTING WITH "✓". Do you agree or disagree with this statement?

	AGREE	DISAGREE
() Ontario is a fun and exciting place to spend your holidays-----	1	2 -75
() Generally speaking, information on travel in Ontario is <u>not</u> very easy to obtain----	1	2 -76
() There's something for everyone to do in Ontario on a vacation-----	1	2 -77
() Ontario is <u>not</u> a very interesting place to spend a holiday-----	1	2 -78
() An Ontario vacation represents good value for your money-----	1	2 -79

8. Thinking of the next 3 months, do you think you will take any pleasure trips in Ontario where you will stay overnight in commercial accommodations?

YES-----1	-80
NO-----2	
DON'T KNOW-----3	

BASIC DATA

Now I'd like to ask you some additional questions so that we can classify our data.

1. Which of the following age categories are you in? READ LIST.

18-29 years-----1 -41
30-49 years-----2
50 years and over-----3

2. RECORD IF:

MALE-----1 -42
FEMALE-----2

3. What is the last level of education you have completed? DO NOT READ LIST.

SOME PUBLIC SCHOOL-----1 -43
COMPLETED PUBLIC SCHOOL-----2
SOME SECONDARY SCHOOL-----3
COMPLETED SECONDARY SCHOOL-----4

SOME COMMUNITY COLLEGE-----5
COMPLETED COMMUNITY COLLEGE-----6
SOME UNIVERSITY-----7
COMPLETED UNIVERSITY-----8
OTHER (SPECIFY)-----9

4. What is your marital status? Are you single, married, divorced, separated or widowed?

SINGLE-----1 -44
MARRIED-----2
DIVORCED/SEPARATED/WIDOWED--3

5. Are there any children under 14 years of age living in your household?

YES-----1 -45
NO-----2

6. Finally, what was your total household income from all sources for 1982 before tax deductions? Would it be over or under \$25,000?

Under \$25,000 -----() Over \$25,000-----(-46)
Is that-----? Is that-----?
Under \$15,000-----1 \$25,000 - \$40,000-----3
or \$15,000 - \$25,000-----2 or \$40,000 and over-----4

REFUSED-----5
DON'T KNOW-----6

LENGTH OF INTERVIEW: _____ 47/48

NAME OF RESPONDENT: _____

ADDRESS: _____

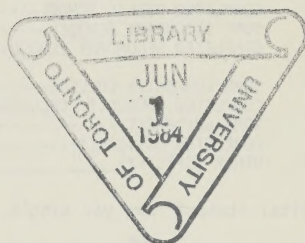
CITY: _____

DATE OF INTERVIEW: _____ TELEPHONE: _____

I HEREBY ATTEST THAT THIS A TRUE AND HONEST INTERVIEW

INTERVIEWER NUMBER 42/44

(INTERVIEWER'S SIGNATURE)



3 1761 11546434 9

